

## 834/820 All Plan Workgroup

### Closed Action Items

Item	Responsibility	Due Date	Closed Date
1. Compile existing Issues for 834 transaction in the 834 Issue Log and distribute to workgroup	Holly Gailey	08/18/03	08/18/03
2. Compile existing Issues for 820 transaction in the 820 Issue Log and distribute to workgroup.	Amy McAllaster	08/18/03	08/22/03
3. Provide 834 mapping docs to Holly <a href="mailto:hgailey@dhs.ca.gov">hgailey@dhs.ca.gov</a>	Group	Ongoing	11/2003
4. Provide 820 mapping docs to Amy <a href="mailto:amcallas@dhs.ca.gov">amcallas@dhs.ca.gov</a>	Group	Ongoing	01/2004
5. Determine availability for sub-workgroup participation to address detailed mapping for the 834 and 820 transactions.	Group	Ongoing	11/2003
6. Review current Issue Log for 820 & 834 transactions and communicate additional 820 & 834 Issues to Holly & Amy	Group	Ongoing	09/20/04
7. Send WG Part list to group for review and corrections, group to respond if corrections are needed. (sent out for review on 9/4)	Amy McAllaster	09/04/03	09/10/03
8. Send Plan Survey results to Workgroup participants for review	MMCD	03/15/04	03/25/04
9. Send notes from 08/11/03 mtg to all workgroup participants.	Amy McAllaster	08/15/03	08/15/03
10. Send notes from 09/08/03 mtg to all workgroup participants	Amy McAllaster	09/10/03	09/10/03
11. Send notes from 10/06/03 mtg to all workgroup participants	Holly Gailey	10/17/03	10/17/03
12. Send notes from 11/03/03 mtg to all workgroup participants	Amy McAllaster	11/14/03	11/25/03
13. Send notes from 12/01/03 mtg to all workgroup participants	Amy McAllaster	12/19/03	12/19/03
14. Send notes from 01/06/04 mtg to all workgroup participants	Amy McAllaster	01/22/04	01/22/04
15. Send notes from 01/26/04 mtg to all workgroup participants	Amy McAllaster	02/19/04	02/19/04
16. Send notes from 02/23/04 mtg to all workgroup participants	Amy McAllaster	03/18/04	02/24/04
17. Send updated 834 Issue Log to all workgroup members.	Holly Gailey	02/25/04	02/23/04
18. Send notes from 04/05/04 mtg to all workgroup participants	Amy McAllaster	04/20/04	04/20/04
19. Send notes from 05/17/04 mtg to all workgroup participants	Holly Gailey	05/28/04	05/20/04

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20. Plans should review Plan Survey results and provide feedback/comments to Michelle Marks at <a href="mailto:mmarks@DHS.ca.gov">mmarks@DHS.ca.gov</a> as requested in the letter. Comments will be shared with MMCD once received and reviewed.	Plans	05/28/04 & ongoing as needed	09/20/04
21. Send notes from 06/28/04 mtg to WG.	Amy McAllaster	07/15/04	07/15/04
22. Post 820 Design document to OHC Internet	Amy McAllaster	07/20/04	07/19/04
23. Send notes from 08/16/04 mtg to WG.	Amy McAllaster	08/31/04	08/23/04
24. Determine if there is a need to resend the Plan Survey results from 08/03 since no feedback has been received.	Amy McAllaster	09/03/04	09/20/04
25. Request for a summary of the overall process and how DHS sees the plans handling the 834 and supplemental file. Include a summary of how the files would be reassembled and processed. (from 08/16/04 mtg) Send to WG.	Holly Gailey	09/20/04	09/20/04
26. Determine Trading Partner ID and what standard will be used. Send to WG.	Holly Gailey	09/20/04	09/20/04
27. Send notes from 09/20/04 mtg to WG.	Amy McAllaster	09/24/04	09/20/04
28. Increase call line limit. Problem with 08/16/04 call in – reached capacity.	Amy McAllaster	11/01/04	09/20/04
29. Send notes from 11/01/04 mtg to WG.	Amy McAllaster	11/08/04	11/02/04
30. OHC to send Trading Partner set up request form to All Plan WG for completion (see AI#31)	Jon Lazaro	12/17/04	12/16/04
31. DHS to provide scenarios for 834 Supplemental File to WG.	Jon Lazaro	11/08/04	11/02/04
32. DHS to provide sample 834 Transaction and post to Internet.	Jon Lazaro	01/25/05; after Alpha test done	Posted to OHC website 02/14/05.
33. WG Plans to email Amy with interest in being 820 testing partners.	Health Plans	11/22/04	12/15/04
34. DHS to provide Companion Guide for 834 to WG and post to Internet.	Jon Lazaro	01/25/05; after Alpha test done	Posted to OHC website 02/14/05.
35. Send notes from 12/13/04 mtg to WG	Amy McAllaster	12/17/04	12/16/04
36. DHS to provide FAME DED to wg	Amy McAllaster	11/08/04	12/15/04
37. Send notes from 01/24/05 mtg to WG	Amy McAllaster	01/31/05	01/31/05
38. Send notes from 03/07/05 mtg to WG	Amy McAllaster	03/11/05	03/11/05

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39. Send updated Issue Log and notes from last Sub WG to participants	Amy McAllaster	03/11/05	03/11/05
40. Send 834/820 Survey to WG	Greg Dawson	03/07/05	03/11/05
41. Send information to WG regarding Medi-Cal website changes being implemented 03/20/05.	Greg Dawson	03/07/05	03/11/05
42. DHS to provide gap analysis information regarding the data elements on FAME mapped to the 834 & Supplemental File to WG and post to Internet.	Lorie Billeci	04/15/05	04/15/05
43. DHS to provide updated 834 Companion Guide and post to Internet.	Lorie Billeci	04/15/05	v4.0 posted 04/15/05
44. Send notes to WG from 04/18/05 Meeting	Amy McAllaster	04/22/05	04/21/05
45. Post Updated FAME DED to OHC Internet	Amy McAllaster	June 2005	06/29/05, posted to OHC Internet
46. Update 834 Issue Log and send to work group	Amy McAllaster	04/30/05	07/14/05, sent to WG
47. Update 820 Issue Log and send to work group	Amy McAllaster	04/30/05	07/14/05, sent to WG
48. Create and provide Change Log for Draft 834 CG version 4.0 to compare to version 2.0 (and continue to update Change Log for future versions)	George Rettele	04/30/05	07/14/05, posted to OHC Internet
49. Send notes to WG from 06/29/05 Meeting	Amy McAllaster	07/10/05	07/14/05, sent to WG
50. DHS to provide Companion Guide for 820 to WG and post to Internet.	George Rettele	June05; after Alpha test done	07/14/05; posted to OHC Internet
51. 6/29/05; Question regarding auto processing, ftp and file encryption was brought up. As this is not her area of expertise, Amy asked that a follow up email be sent for proper routing and research (received & routed, answer forthcoming).	Amy McAllaster	Target for response by end of August 05	See notes from 09/08/05 meeting.
52. Plans to fill in and return trading partner set up request form to DHS.	Health Plans	11/05/04; ongoing	10/18/05
53. DHS to provide sample 820 Transaction to WG and post to Internet.	George Rettele	June05; after Alpha test done	Posted 09/16 and updated 11/05.
54. Update Issue log with Q&A raised at July and Sept meeting (detailed under Open Discussion)	Amy McAllaster	09/15/05	09/16/05

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and email back to WG.			
55. Send meeting notes to WG from 09/08/05 mtg	Amy McAllaster	09/15/05	09/16/05
56. Add item for 834 COHS Status to Agenda for next meeting	Amy McAllaster	09/25/05	10/18/05
57. Send meeting notes to WG from 10/18/05 mtg	Amy McAllaster	11/08/05	Sent 11/07
58. Send Medicare Part D information to WG	Amy McAllaster Greg Dawson	10/31/05	Sent 11/07
59. Send meeting notes to WG from 11/14 mtg	Amy McAllaster	11/18/05	Sent 11/15
60. Send Medicare Part D contact person information to WG.	Amy McAllaster	02/15/06	03/17/06
61.			
62.			
63.			
64.			